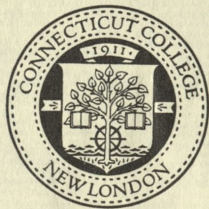


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THE REGION'S ECONOMY•1973

SOUTHEASTERN CONNECTICUT
REGIONAL PLANNING AGENCY

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THE REGION'S ECONOMY, 1973

SOUTHEASTERN CONNECTICUT REGION

Project CPA-CT-01-26-1037

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Southeastern Connecticut Regional Planning Agency
139 Boswell Avenue, Norwich, Connecticut

April, 1974

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ABSTRACT OF REPORT

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9. Abstract: This report updates the basic planning information on the economy of the region. It describes the trends that have been in operation over the past ten years in employment, in retail sales, and in the locations chosen by various forms of commercial and industrial enterprises. In addition to the analysis of regional economic trends, comparisons are drawn between the relative economic strength of the New London Labor Market Area and the Norwich Labor Market Area.

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Stephen Wolinski, Griswold
David Wordell, Salem

AGENCY STAFF INVOLVED IN PREPARATION OF THE REPORT

Richard B. Erickson, Executive Director
Charles H.F. Storrow, Regional Planner, (primary
responsibility for the study)
Arlene Lewis, Administrative Assistant
Helen Gahrman, Secretary

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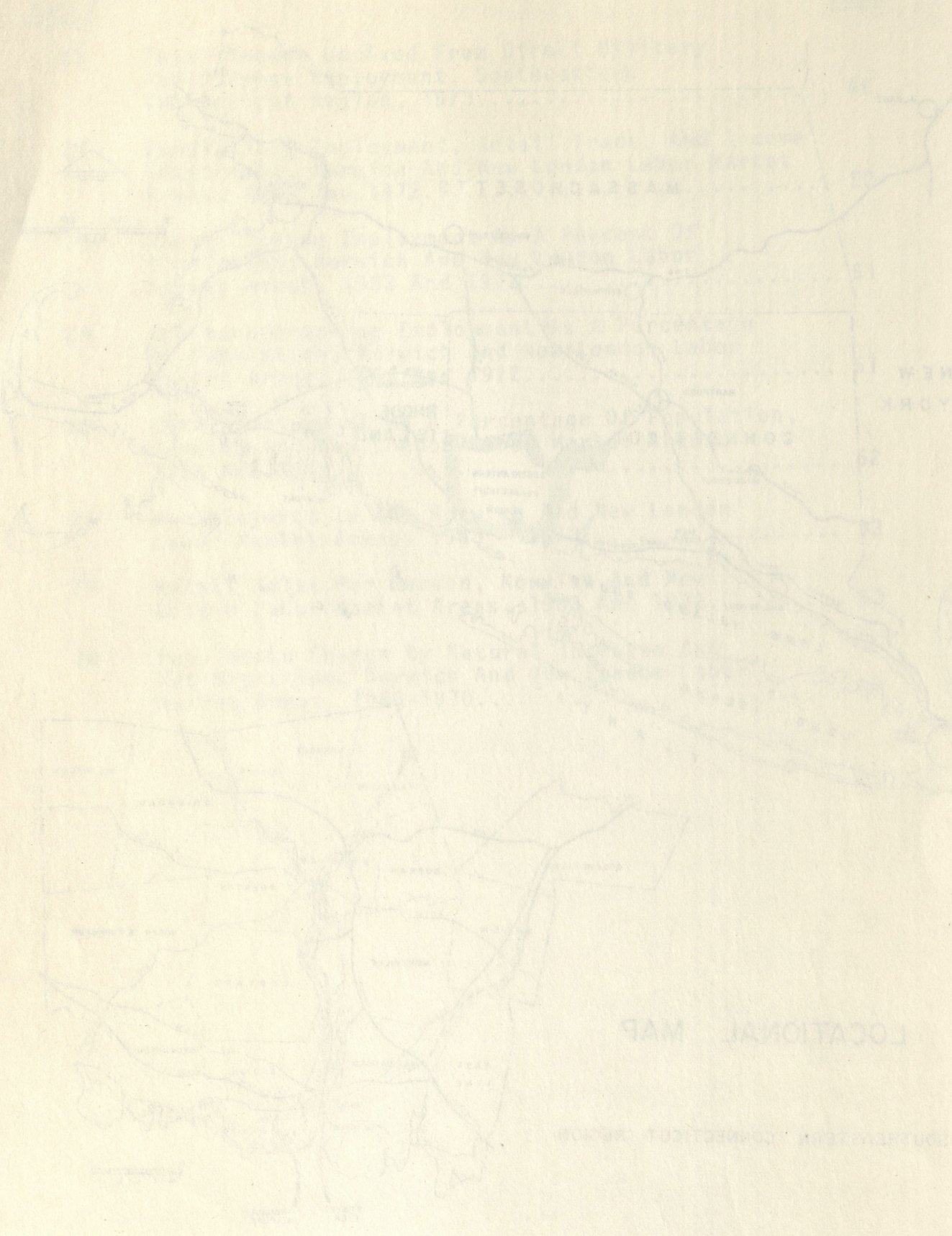
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LOCATIONAL MAP

SOUTHEASTERN CONNECTICUT REGION

Scale 1:100,000

This report is one of a series of background studies now being conducted by the Southeastern Connecticut Planning Council. It is intended to provide a basis for the development of a regional plan of development. However, the report is not intended to be a final statement on the subject of the region. It is intended to be a working document for the use of the Council and its members.

In the preceding sections, several questions are addressed. First, the basic data on the region are presented. This includes a description of the region's location, its size, and its population. It also includes a description of the region's economy and its major industries. Second, the report discusses the region's development problems. This includes a discussion of the region's unemployment problem, its housing problem, and its transportation problem. Third, the report discusses the region's development opportunities. This includes a discussion of the region's potential for industrial development, its potential for agricultural development, and its potential for tourism development.

I. INTRODUCTION

The purpose of this report is to provide a general overview of the region and its development problems and opportunities. It is intended to be a working document for the use of the Council and its members. It is not intended to be a final statement on the subject of the region. It is intended to be a document that will be used to guide the development of a regional plan of development.

The report is divided into two main sections. The first section, "The Region," provides a general overview of the region and its development problems and opportunities. The second section, "Development Problems and Opportunities," provides a more detailed discussion of the region's development problems and opportunities. The first section is divided into three main parts. The first part, "Location and Size," provides a description of the region's location and size. The second part, "Population," provides a description of the region's population. The third part, "Economy," provides a description of the region's economy.

The second section is divided into two main parts. The first part, "Development Problems," provides a discussion of the region's development problems. The second part, "Development Opportunities," provides a discussion of the region's development opportunities. The first part is divided into three main parts. The first part, "Unemployment," provides a discussion of the region's unemployment problem. The second part, "Housing," provides a discussion of the region's housing problem. The third part, "Transportation," provides a discussion of the region's transportation problem. The second part is divided into three main parts. The first part, "Industrial Development," provides a discussion of the region's potential for industrial development. The second part, "Agricultural Development," provides a discussion of the region's potential for agricultural development. The third part, "Tourism Development," provides a discussion of the region's potential for tourism development.

This report is one of a series of background studies now being conducted by the Southeastern Connecticut Regional Planning Agency which have as their purpose the assembly of basic data for an update of the Regional Plan of Development. However, the information presented here is intended not only to accomplish this objective, but to be of immediate use to the people of the region. This particular report is concerned with the workings of the economy.

In subsequent sections, several questions are addressed. First, from the land-use point of view, it was desired to investigate the trends in the location of the various forms of economic activity and determine in what kinds of areas they seem to locate. Second, comparisons have been drawn between the New London Labor Market Area and the Norwich Labor Market Area in order to provide some insight into the relative economic health of these two subregions. Third, it was desired to know to what extent the region's economic dependence on defense industry had increased or decreased.

This study primarily is one which reports data and attempts to measure trends that the data indicate as having been in operation over the past ten years. It thus does not present ideas on advantageous future changes in the economy, but it is hoped that it will be useful to those who are engaged in economic development.

In several of the subsequent sections of this report, the towns of the region have been grouped in three broad categories, based on their development characteristics. These categories are the Urban Towns of Groton, New London and Norwich; the Suburban Towns, Colchester, East Lyme, Griswold, Ledyard, Lisbon, Montville, Preston, Sprague, Stonington and Waterford; and finally the Rural Towns of Bozrah, Franklin, North Stonington, Salem and Voluntown.

In two sections of this report, labor market areas are employed as the basic units of one or more of the analyses. These areas are those employed by the State of Connecticut Labor Department to report employment data. The Southeastern Connecticut Planning Region is made up of two such areas, the New London Labor Market Area and the Norwich Labor Market Area. The New London area includes the towns of East Lyme, Groton, Ledyard, Lyme, Montville, New London, North Stonington, Old Lyme, Salem, Stonington, and Waterford. Lyme and Old Lyme are outside of the Southeastern Connecticut Planning Region. The Norwich Labor Market Area contains the towns of Bozrah, Colchester, Franklin, Griswold, Lisbon, Norwich, Preston, Sprague and Voluntown. All of the Norwich Labor Market Area is within the Southeastern Connecticut Planning Region.

II. OCCUPATION AND EMPLOYMENT

CIVILIAN LABOR FORCE CHARACTERISTICS

The census indicates that in the spring of 1970 Southeastern Connecticut had a total civilian labor force of slightly more than 79,000 persons 16 years or older. Of this total, 62% were males and 38% were females. There were about 2,500 black workers in the labor force. On a relative basis, blacks comprised 3% of the region's total civilian labor force and 3% of its total population. 56% of the black labor force was male.

Available data indicate that Southeastern Connecticut has a very low percentage of females 16 years or older who participate in the labor force. New London County, which contains three more towns than the planning region, had 40% of its female population 16 or more years of age in the labor force. This was the lowest participation rate of the state's 8 counties and compares with a median of 45.8% among the counties. If New London County women had participated at the same rate as those in Hartford County, which led Connecticut's counties with a rate of 48.3%, approximately 6,500 additional women would have been in the labor force. Similarly, the New London-Groton-Norwich SMSA, which has six fewer towns than the planning region, had a participation rate of 39.9%. This was the lowest among the 12 SMSAs in Connecticut and compares with a median rate of 45.5% among them. The cause of this low female labor force participation rate is not clear. The number of non-labor force females 16 years or more of age in New London County who are inmates of institutions or are enrolled in school is not large enough to explain the low participation rate. It may possibly be due to the lack of attractive job opportunities for women in this region.

Table 1 shows the total civilian labor force distribution within the region. Its pattern is quite similar to that of the total population. The three urban towns, with 49% of the region's civilian labor force, have 50% of the region's population. Collectively, the 10 suburban towns have 46% of the region's labor force and 45% of its population. Five rural towns combined have 5% of both the region's labor force and population.

Skills of the employed labor force in Southeastern Connecticut do not differ markedly from the state as a whole. The region has a slightly smaller percentage of its workers classed as professional* than is true statewide, 25% compared to 27%. In the highly-skilled category, the region is ahead of the state, 21%

* For purposes of this report, the terms "professional, highly-skilled, and semi-skilled," contain the following occupational categories used in the census: Professional - professional, technical, managerial, and administrative positions; highly-skilled - craftsmen, foremen, and transport equipment operatives; semi-skilled - clerical, operatives, laborers, farm workers, service, private household, and sales workers.

TABLE 1: TOTAL CIVILIAN LABOR FORCE, 1970
(Males and females 16 years or more of age
in the civilian labor force.)

	<u>Males</u>	<u>Females</u>	<u>Total</u>	<u>% of Regional Total</u>
<u>URBAN TOWNS</u>				
Groton	6,645	4,251	10,896	13.8
New London	6,505	4,993	11,498	14.5
Norwich	<u>9,880</u>	<u>6,541</u>	<u>16,421</u>	<u>20.7</u>
URBAN TOTALS:	23,030	15,785	38,815	49.0
<u>SUBURBAN TOWNS</u>				
Colchester	1,613	951	2,564	3.2
East Lyme	2,752	1,393	4,145	5.2
Griswold	1,965	1,058	3,023	3.8
Ledyard	2,327	1,339	3,666	4.6
Lisbon	720	355	1,075	1.4
Montville	3,841	2,018	5,859	7.4
Preston	917	465	1,382	1.7
Sprague	712	438	1,150	1.5
Stonington	4,090	2,469	6,559	8.3
Waterford	<u>4,378</u>	<u>2,492</u>	<u>6,870</u>	<u>8.7</u>
SUBURBAN TOTALS:	23,315	12,978	36,293	45.8
<u>RURAL TOWNS</u>				
Bozrah	604	294	898	1.2
Franklin	367	215	582	.7
North Stonington	910	439	1,349	1.7
Salem	368	217	585	.7
Voluntown	<u>441</u>	<u>256</u>	<u>697</u>	<u>.9</u>
RURAL TOTALS:	2,690	1,421	4,111	5.2
REGIONAL TOTALS:	49,035	30,184	79,219	100.0

Source: Bureau of the Census, General Social and Economic Characteristics, PC(1)-C8, 1970, Tables 104 and 117.

compared to 18%. 54% of the region's employed workers were classed as semi-skilled, while for the state as a whole the figure was 55%.

Within the region there are significant differences in the occupational skills of the population from one town to another. (See Table 2.) The suburban area has a noticeably higher concentration of professional and highly-skilled occupations among its residents. As a group, the suburban towns had about 50% of their resident workers in the two highest skill classes. In contrast, the rural and urban towns stood at 46% and 43% respectively.

The uneven pattern of job skill distribution is still more noticeable if individual towns are studied. East Lyme and Ledyard, for example, had close to 4 out of every 10 working residents employed in occupations classified as professional. In Groton, North Stonington, Colchester, Montville, Preston, and Salem the figure approached 3 out of every 10 workers. The 10 remaining towns were below this figure.

Highly-skilled workers displayed a similar pattern of variation from town to town. In Sprague, nearly 3 out of every 10 working residents was classed as highly-skilled. All of the urban towns, two suburban towns, and one rural town had less than 2 out of every 10 workers in this category. The balance of the towns fell between these two extremes.

Fully comparable data on job levels are not available for black workers. However, the census does provide this information for the New London-Groton-Norwich SMSA. This excludes North Stonington, Voluntown, Franklin, Bozrah, Colchester, and Salem in this region and includes Old Lyme from the Connecticut River Estuary Region. These data provide a crude indication of the employment profile of the black working population in this area. Of the 2,317 black workers in the SMSA, 16% were classified as professional, compared with 25% for the total regional work force. 16% were classed as highly skilled, compared with 21% for the region. And 68% were in jobs described as semi-skilled, compared with 54% for the region.

No data are available on "other" nonwhite members of the labor force.

EMPLOYMENT

Employment in civilian jobs covered by unemployment insurance totaled slightly more than 73,000* in Southeastern Connecticut in

* In addition, a significant number of military personnel are

TABLE 2: OCCUPATIONS, TOTAL EMPLOYED, 16 YEARS+, 1970
(By place of residence)

	Professional*		Highly-Skilled*		Semi-Skilled*		Total	
	Number	% of Total	Number	% of Total	Number	% of Total	Number	% of Total
URBAN TOWNS								
Groton	3,037	29.2	1,943	18.7	5,415	52.1	10,395	100.0
New London	2,820	25.6	1,903	17.3	6,305	57.1	11,028	100.0
Norwich	3,272	20.8	3,094	19.6	9,388	59.6	15,754	100.0
URBAN TOTALS:	9,129	24.6	6,940	18.7	21,108	56.8	37,177	100.0
SUBURBAN TOWNS								
Colchester	359	27.2	330	25.0	632	47.8	1,321	100.0
East Lyme	1,481	37.1	879	22.0	1,634	40.9	3,994	100.0
Griswold	432	14.8	745	25.6	1,738	59.6	2,915	100.0
Ledyard	1,359	38.6	595	16.9	1,567	44.5	3,521	100.0
Lisbon	222	21.6	271	26.4	534	52.0	1,027	100.0
Montville	1,562	27.7	1,410	25.0	2,660	47.3	5,632	100.0
Preston	369	27.2	214	15.8	772	57.0	1,355	100.0
Sprague	188	16.9	321	28.8	606	54.3	1,115	100.0
Stonington	1,378	21.9	1,414	22.5	3,486	55.6	6,278	100.0
Waterford	1,733	26.0	1,532	23.0	3,409	51.0	6,674	100.0
SUBURBAN TOTALS:	9,083	26.8	7,711	22.8	17,038	50.4	33,832	100.0
RURAL TOWNS								
Bozrah	173	20.0	223	25.8	469	54.2	865	100.0
Franklin	123	22.0	118	21.0	319	57.0	560	100.0
North Stonington	359	28.6	310	24.7	588	46.7	1,257	100.0
Salem	155	27.6	127	22.6	279	49.8	561	100.0
Voluntown	97	14.5	117	17.5	455	68.0	669	100.0
RURAL TOTALS:	907	23.2	895	22.9	2,110	53.9	3,912	100.0
REGIONAL TOTALS:	19,119	25.5	15,546	20.8	40,256	53.7	74,921	100.0

* See footnote on page 4 for definitions.

Source: Bureau of the Census, Selected Fourth Count Statistics, 1970.
 Bureau of the Census, General Social and Economic Characteristics, PC(1)-C8, 1970, Tables 105 and 118.
 Bureau of the Census, Census Tracts, PHC(1)-143, 1970, Table 1-3.

over half
Semi-skilled

June of 1970.* This figure was up about 31,000 from 1960, a 74% increase. However, some of this increase was due to extensions of unemployment insurance coverage during the decade.

Manufacturing jobs totaled 28,630, or 38% of all employment. This compares with 35% for the state as a whole. About 12,000 of these jobs are believed to have been at the Electric Boat Division of General Dynamics in Groton.** Other leading manufacturing sectors were chemicals, plastics, insulated food containers, and paper products. Nearly three out of every four manufacturing jobs were located in the three urban communities of Groton, New London, and Norwich.

Manufacturing lost ground relatively as an employer in Southeastern Connecticut during the decade of the 60's. Connecticut Labor Department data show that while manufacturing employment in the region grew by nearly 3,500 jobs, it slipped badly from 60% of all covered civilian employment in 1960 to 38% in 1970. Within the manufacturing sector, significant employment losses occurred over the decade in the textile, apparel, and leather industries. Two leading growth areas in the nonmanufacturing economic sector have been trade and government, each of which accounted for nearly 20% of all civilian employment in 1970.

Most of the employed civilian labor force residing in Southeastern Connecticut has been able to find work within the region. Although data are not available on a regional basis, census information on New London County, which is larger by three towns than the planning region, shows that nearly 82% of the county residents worked within this county in 1970.*** This is the second highest percentage of employees working within their county of residence of any of Connecticut's eight counties. Only Hartford County, with 85% of its residents working within its borders, ranked higher. The next highest was New Haven County at 79%, while the lowest was Tolland County with 40%.

Data on the New London-Groton-Norwich SMSA reinforce the view that most workers living in this region can find employment here. The SMSA data show that 82% of the resident workers were

stationed in this region. In 1972 the total was slightly over 15,000, of whom about 13,500 were U.S. Navy personnel and nearly 1,100 were cadets at the U.S. Coast Guard Academy.

* Connecticut Labor Department. New London and Norwich Labor Market Letters, July, 1970.

** Brown, Donald, and Donald Planning Services. Economic Analysis for Town of Groton, Farmington, Conn., 1972, p. 39.

*** General Social and Economic Characteristics, Connecticut, PC(1)-C8, op. cit., Table 119.

employed within the SMSA. There are only a few notable exceptions to this. Of the workers living in Colchester, 93% commute to jobs outside the SMSA, chiefly in the Hartford area. In Franklin the figure is 75%. And in Salem and Voluntown it is over 50%. The recent completion of major new sections of the Route 2 and the Route 11 expressways into this region is likely to encourage greater commutation to the Hartford area from the northwestern section of this region.

Within the region civilian employment opportunities are very unevenly distributed. (See Table 3.) Better than 7 out of every 10 jobs are located in the three urban communities of Groton, New London, and Norwich. Groton alone accounts for 3 out of every 10 jobs. Together the 15 suburban and rural towns provide only about 3 out of every 10 jobs.

Of particular note are the great differences between the percentage of the region's total population and the jobs available from town to town and among different classes of towns. With only half the region's population, the urban towns contain nearly three-quarters of its civilian employment. Of the urban towns, only Norwich has a fairly close balance between its share of population and employment. The suburban towns are highly out of balance, due to rapid population growth coupled with only modest economic growth. With nearly 45% of the region's population, the suburbs have less than 27% of its civilian jobs. To achieve a proportionate balance between population and jobs, the suburban towns collectively would have to add 23,000 new jobs to their economies. Of the suburban towns, only Stonington comes close to striking a balance between its share of population and employment. As might be expected, the rural towns as a group have few nonagricultural job opportunities within their borders. With nearly 5% of the region's population, they have only slightly more than 1% of its nonagricultural civilian jobs.

The shifts between 1960 and 1970 in the balance of population and jobs among the three classes of towns were not startling. In both years the three urban towns contained close to three-quarters of the region's civilian nonagricultural employment. The 10 suburban towns as a group improved their employment position by adding approximately 10,000 jobs during the decade.* This was nearly a 100% increase, while their population grew by 40%. As a result, they raised their share of the region's jobs slightly.

The uneven distribution of population and jobs makes for a complex commuting pattern within the region. Data from the 1970 census do not permit a fully detailed analysis of commuters, but they do allow us to identify the commutation of workers from the

* 1960 data from Connecticut Labor Department, as presented in Economic Profiles published by the Hartford National Bank and Trust Company, 1968.

TABLE 3: COMPARISON OF POPULATION AND TOTAL
NONAGRICULTURAL CIVILIAN EMPLOYMENT, 1970

	Population		Total Nonagricultural Civilian Employment	
	<u>Number</u>	<u>% of Total</u>	<u>Number</u>	<u>% of Total</u>
<u>URBAN TOWNS</u>				
Groton	38,523	17.5	22,560	30.6
New London	31,630	14.4	16,310	22.2
Norwich	41,433	18.8	14,100	19.2
URBAN TOTALS:	111,586	50.7	52,970	72.0
<u>SUBURBAN TOWNS</u>				
Colchester	6,603	3.0	1,520	2.1
East Lyme	11,399	5.2	1,620	2.2
Griswold	7,763	3.5	2,130	2.9
Ledyard	14,558	6.6	1,050	1.4
Lisbon	2,808	1.3	290	.4
Montville	15,662	7.1	2,390	3.2
Preston	3,593	1.6	1,610	2.2
Sprague	2,912	1.3	1,230	1.7
Stonington	15,940	7.3	4,790	6.5
Waterford	17,227	7.8	2,910	4.0
SUBURBAN TOTALS:	98,465	44.7	19,540	26.6
<u>RURAL TOWNS</u>				
Bozrah	2,036	.9	310	.4
Franklin	1,356	.6	250	.3
North Stonington	3,748	1.7	270	.4
Salem	1,453	.7	90	.1
Voluntown	1,452	.7	140	.2
RURAL TOTALS:	10,045	4.6	1,060	1.4
REGIONAL TOTALS:	220,096	100.0	73,570	100.0

Sources: Bureau of the Census, Census Tracts, PHC(1)-143, 1970,
Table P-1.
Connecticut Labor Department, as presented in Market Data,
1972, published by the Connecticut Development Com-
mission.

region's towns to the major employment centers in the three urban communities. Figure 1 displays this pattern graphically. Perhaps the most striking aspect of this map is the dominant role played by the Town of Groton in the employment structure of Southeastern Connecticut. A second pertinent point is the regional nature of the area's economy. No single community emerges as being totally self-sufficient.

Data on unemployment are available from two different sources, the 1970 census and the monthly reports of the Connecticut Labor Department. The definitions used by these sources differ, and so the reported numbers and rates of unemployment are not identical. However, they do provide a reasonable approximation of the unemployment situation in the region.

Census returns for April of 1970, based on a 20% sample of the region's population, indicate that of the total civilian labor force 16 years or more old, 3,109 individuals were unemployed. This would represent 3.9% of the civilian labor force.*

On the other hand, reports from the Connecticut Labor Department for the same time period indicate a combined total unemployment of 4,000 for the New London and Norwich Labor Market Areas, which together are slightly larger than the planning region. The overall rate of unemployment for the region was 4.7%.** The Labor Department data, it should be noted, include only those individuals covered by unemployment insurance.

It appears that something like 4-5% of the region's civilian labor force in April of 1970 was unemployed. Subsequently, the rate increased to a peak of 8% in June of 1972,** but has now returned to its former level.

Southeastern Connecticut's economy has done fairly well during the past several years of economic recession. Table 4 illustrates this point.

Of the 16 months sampled, the rate of unemployment in the region fell below that for the state as a whole during 14 months and was equal in one month. Measured against the performance of the other Labor Market Areas in Connecticut, the region did particularly well. During the months studied, Southeastern Connecticut consistently fell into the group of Labor Market Areas with the lowest unemployment rates. During the last three months examined, the region had the lowest or second lowest rate of unemployment.

* Bureau of the Census, General Social and Economic Characteristics, op. cit., Tables 104 and 117.

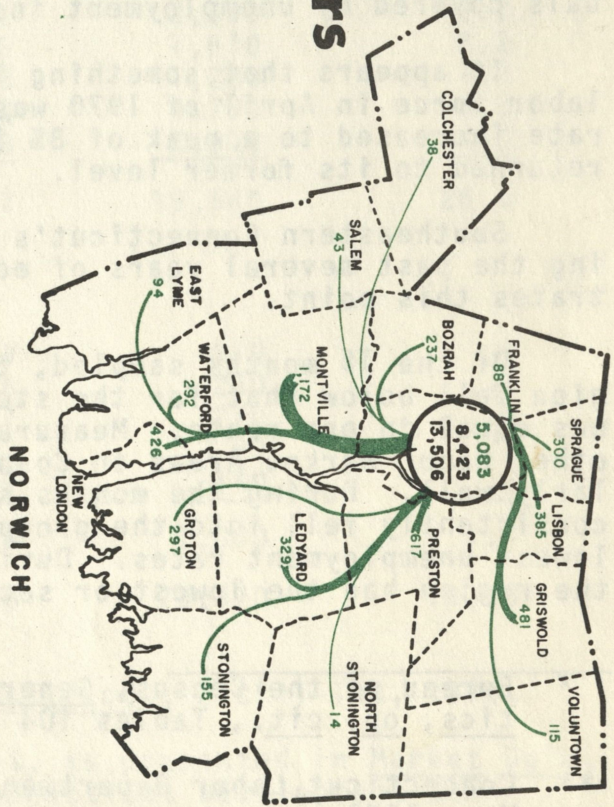
** Connecticut Labor Department, Connecticut, Labor Situation, May, 1970.

*** Connecticut Labor Department, Connecticut, Labor Situation, June, 1972.

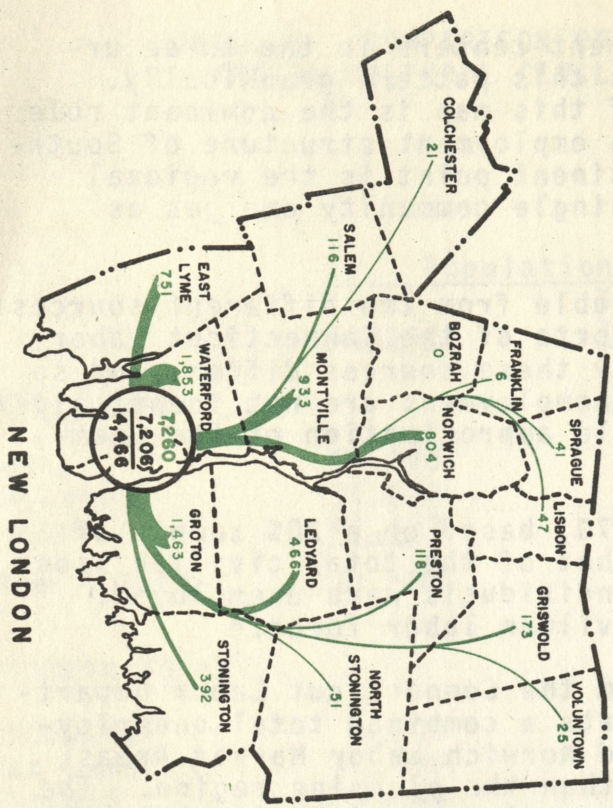
Commutation Of Workers Within Southeastern Connecticut To Major Employment Centers 1970

KEY:
 1,357 — NON-RESIDENT WORKERS
 2,466 — RESIDENT WORKERS
 3,823 — TOTAL WORKERS

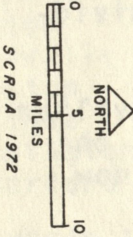
SOURCE: THE 1970 CENSUS WHICH INCLUDES MILITARY PERSONNEL
 AS WELL AS CIVILIAN WORKERS.



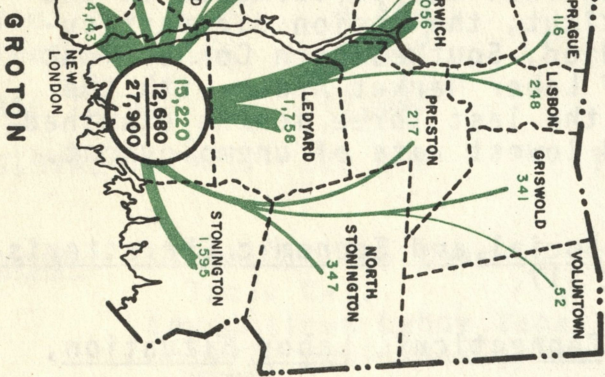
NORWICH



NEW LONDON



SCRPA 1972



GROTON

FIGURE 1

TABLE 4: COMPARISON OF UNEMPLOYMENT DATA,
1970-1973

Date	% of Labor Force Unemployed		Southeastern Connecticut's Rank in % Unemployed Among 16 Labor Market Areas*
	<u>Southeastern Connecticut</u>	<u>State of Connecticut</u>	
March, 1970	4.6	4.6	4th Lowest
June	6.2	6.1	4th Lowest
September	5.4	5.8	5th Lowest
December	5.4	6.7	4th Lowest
March, 1971	6.6	8.5	Lowest
June	8.5	10.1	4th Lowest
September	6.4	8.3	Lowest
December	6.6	8.1	2nd Lowest
March, 1972	7.9	9.4	2nd Lowest
June	8.0	9.4	2nd Lowest
September	5.5	6.4	3rd Lowest
December	5.6	5.7	5th Lowest
March, 1973	5.3	5.6	3rd Lowest
June	5.6	6.3	2nd Lowest
September	4.0	5.0	Lowest
December	4.1	5.0	2nd Lowest

* By combining the Norwich and New London Labor Market Areas to produce a single figure for Southeastern Connecticut, the total number of Labor Market Areas in Connecticut is reduced from 17 to 16.

Source: Connecticut Labor Department. Connecticut, The Labor Situation, selected issues from 1969-1973.

TABLE 4. COMPARISON OF UNEMPLOYMENT DATA
1930-1937

Unemployment Rate		Unemployment Rate	
State	1930-1937	State	1930-1937
Alabama	10.5	Connecticut	8.5
Arizona	10.5	Delaware	8.5
Arkansas	10.5	District of Columbia	8.5
California	10.5	Florida	8.5
Colorado	10.5	Georgia	8.5
Connecticut	8.5	Idaho	8.5
Delaware	8.5	Illinois	8.5
District of Columbia	8.5	Indiana	8.5
Florida	8.5	Iowa	8.5
Georgia	8.5	Kansas	8.5
Idaho	8.5	Kentucky	8.5
Illinois	8.5	Louisiana	8.5
Indiana	8.5	Maine	8.5
Iowa	8.5	Maryland	8.5
Kansas	8.5	Massachusetts	8.5
Kentucky	8.5	Michigan	8.5
Louisiana	8.5	Minnesota	8.5
Maine	8.5	Mississippi	8.5
Maryland	8.5	Missouri	8.5
Massachusetts	8.5	Montana	8.5
Michigan	8.5	Nebraska	8.5
Minnesota	8.5	Nevada	8.5
Mississippi	8.5	New Hampshire	8.5
Missouri	8.5	New Jersey	8.5
Montana	8.5	New Mexico	8.5
Nebraska	8.5	New York	8.5
Nevada	8.5	North Carolina	8.5
New Hampshire	8.5	North Dakota	8.5
New Jersey	8.5	Ohio	8.5
New Mexico	8.5	Oklahoma	8.5
New York	8.5	Oregon	8.5
North Carolina	8.5	Rhode Island	8.5
North Dakota	8.5	South Carolina	8.5
Ohio	8.5	South Dakota	8.5
Oklahoma	8.5	Tennessee	8.5
Oregon	8.5	Texas	8.5
Rhode Island	8.5	Utah	8.5
South Carolina	8.5	Vermont	8.5
South Dakota	8.5	Virginia	8.5
Tennessee	8.5	Washington	8.5
Texas	8.5	West Virginia	8.5
Utah	8.5	Wisconsin	8.5
Vermont	8.5	Wyoming	8.5
Virginia	8.5		
Washington	8.5		
West Virginia	8.5		
Wisconsin	8.5		
Wyoming	8.5		

Source: Connecticut Labor Department, Connecticut, The Labor Situation, selected figures from 1930-1937.

to compare the North and New London, 1930-1937, and to produce a final figure for Southern Connecticut and the unemployment of labor in Connecticut in 1937.

III. MANUFACTURING EMPLOYMENT

REGIONAL INVESTIGATION

The SCRPA 1964 report on the regional economy states that in 1810 less than three out of every 100 Connecticut residents were employed in manufacturing. By the close of the 19th century nearly 20 out of every 100 residents were manufacturing workers, and nearly 44% of the State's labor force were engaged in manufacturing.* The peak of participation was reached in 1919 when more than 56% of the State's labor force was employed in manufacturing.

The trend in employment in manufacturing has been downwards in the Southeastern Planning Region, not only since the early years of the century, but in the past 10 years. In 1959, according to the 1960 U.S. Census, 39% of the resident labor force was employed in manufacturing, while the comparable figure for 1969 was 34%.

Data from the Connecticut Labor Department, which give information on all employment, both resident and non-resident, in the region covered by unemployment insurance, indicate that in the early years after World War II manufacturing employment increased but that in the past decade it has dropped. These data are summarized in Table 5 below.

TABLE 5: MANUFACTURING AND TOTAL EMPLOYMENT
SOUTHEASTERN CONNECTICUT REGION

Date, June of:	Total Covered Non-Agricultural Employment	Total Covered Manufacturing Employment	Manufacturing As A % Of Total Employment
1947	38,980	17,440	44.7
1960	56,690	25,730	45.4
1963	63,790	31,420	49.3
1972	75,120	26,120	34.8

Source: Data supplied by the Connecticut State Department of Labor.

As mentioned above, these data are based on information on the numbers of people enrolled in the State unemployment insurance program. Part of the percentage drop in manufacturing in recent years can be attributed to the increase in the percentage of people in the non-manufacturing sector who are now covered by this

* Regional Economy, 1964, Southeastern Connecticut Regional Planning Agency, May, 1964, page 22.

insurance. However, the census figures above corroborate the fact that there has been an actual percentage decrease in manufacturing employment for residents of Southeastern Connecticut.

Figure 2 illustrates the changes in the types of manufacturing employment available to Southeastern Connecticut residents from 1947 through 1972. The chart shows the dramatic decline in the textile industry that took place in the years immediately following World War II and also shows how that industry's place was taken by transportation equipment, which here means submarines built at the Electric Boat Division of General Dynamics in Groton.

In the past ten years the mix of manufacturing types in the region has been relatively stable. The non-durable industries shown on Figure 2 are apparel and textiles, paper, and chemicals. Of these, paper has decreased significantly from 5.4% to 3.7% of the total. However, its place has been taken by chemicals, which shows an increase due almost entirely to the Charles Pfizer Company in Groton and to the Dow Chemical Company in Ledyard. In the 1964 SCRPA report on the regional economy,* other non-durable industry categories were mentioned, notably leather and printing and publishing. Here, these are included in the "other industries" category because of State Labor Department policies on the release of data which would give information on any one firm. However, an investigation by the SCRPA staff indicated that these industries have decreased in importance since 1963.

The durable industries shown on Figure 2 are transportation equipment, machinery and fabricated metals. Of these, as has been mentioned, transportation equipment, primarily submarines, still occupies its very dominant position. Although employment in this category has decreased slightly on a percentage basis since 1964, it is expected to increase again in the very near future with increased orders for submarines. There have not been important changes in the percentages of total industrial employment in machinery and fabricated metals. As mentioned above for the non-durable industries, employment in some categories of durable industries that were reported on by SCRPA in 1964 are not available at the present time. These are furniture and wood and primary metals. However, their significance for the economy was not great at that time and has not increased.

In summary, there has been relatively little change in the structure of manufacturing employment in Southeastern Connecticut since 1964.

NORWICH AND NEW LONDON LABOR MARKET AREA COMPARISON

The towns which make up the Norwich and New London Labor

* op. cit., page 23.

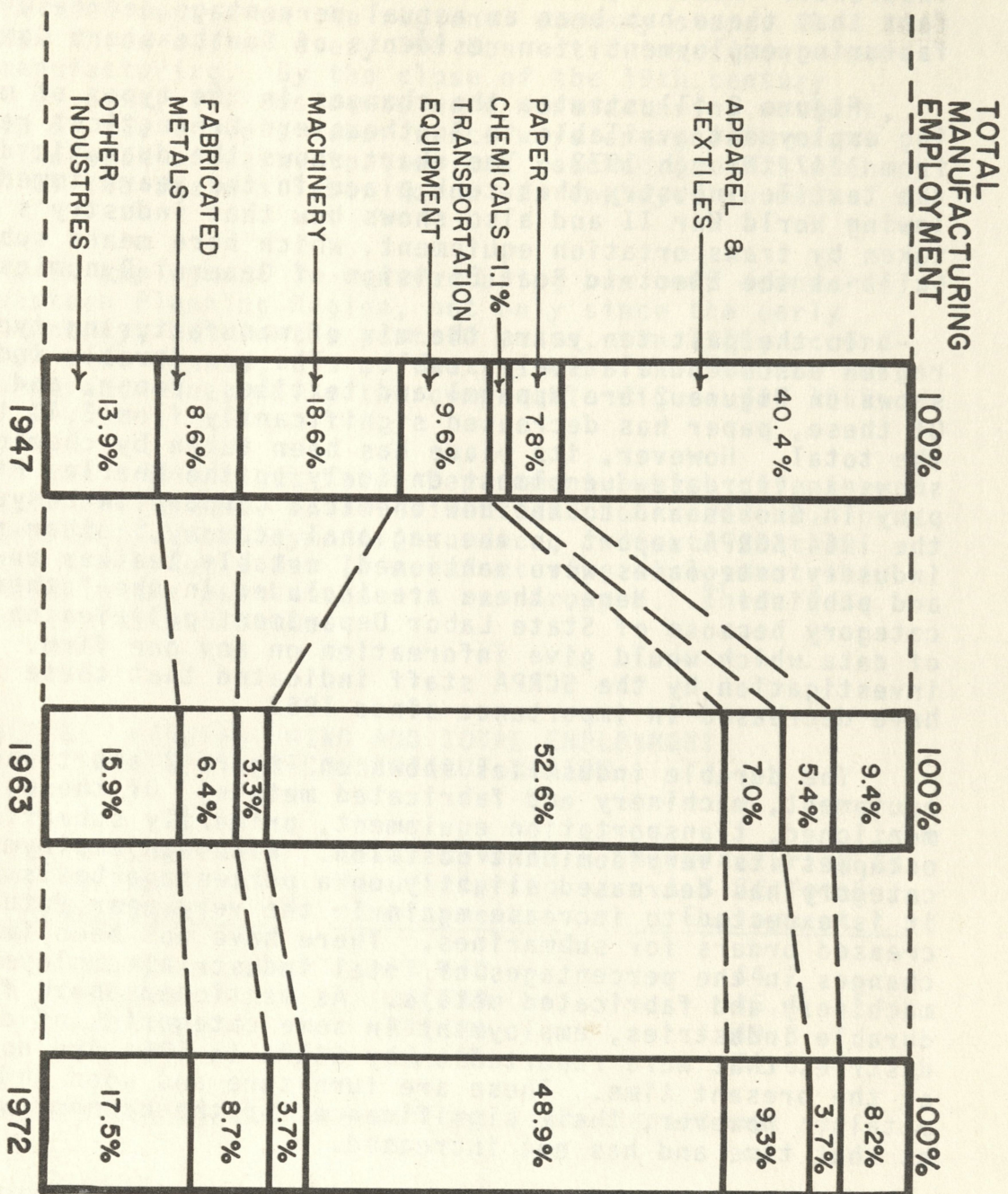


FIG. 2
CHANGING MANUFACTURING BASE;
EMPLOYMENT IN INDUSTRY
IN SOUTHEASTERN CONNECTICUT
 DATA FROM STATE LABOR DEPT.

Market areas are listed in the Introduction to this report. Manufacturing employment in the two labor market areas is listed in Table 6 below. Lyme and Old Lyme are omitted from the tabulation as they are not within the Southeastern Planning Region. In addition to the employment estimates, the table gives the number of manufacturing employees per 1,000 population in each of the two areas.

TABLE 6: MANUFACTURING EMPLOYMENT IN THE NEW LONDON AND NORWICH LABOR MARKET AREAS, 1972

	New London <i>in region of city?</i>		Norwich	
	Employees	Employees Per 1,000 Population	Employees	Employees Per 1,000 Population
Textiles and Apparel	1,040	7.64	1,465	16.46
Paper	480	3.53	633	7.11
Chemicals	2,820	20.74	-	-
Fabricated Metals	1,285	9.45	1,375	15.40
Machinery	1,126	8.28	-	-
Transportation Equipment	14,850	109.19	-	-
Other Manufacturing	1,925	14.15	3,480	39.10
TOTAL:	23,526	172.98	6,953	78.07

Sources: Data from the Connecticut State Labor Department and investigation by SCRPA.

The table shows that on the basis of employees per 1,000 population, the Norwich area is lagging behind the New London area. However, Norwich does lead in most of the categories reported, with the exceptions of transportation equipment and chemicals. These industries are primarily made up of three firms in the New London Labor Market Area: Electric Boat Division of General Dynamics (Submarines) and Charles Pfizer, Inc., and Dow Chemical Company (Chemicals).

Figure 3 shows another comparison. The same manufacturing employment data are shown as a percentage of the State of Connecticut Labor Department data for total employment in each labor market area. As mentioned before, these latter data are derived from unemployment insurance returns. The same trends are apparent. New London has the overall lead, but in areas other than transportation equipment and chemicals, the Norwich Labor Market Area is in a better position than the New London Labor Market Area.

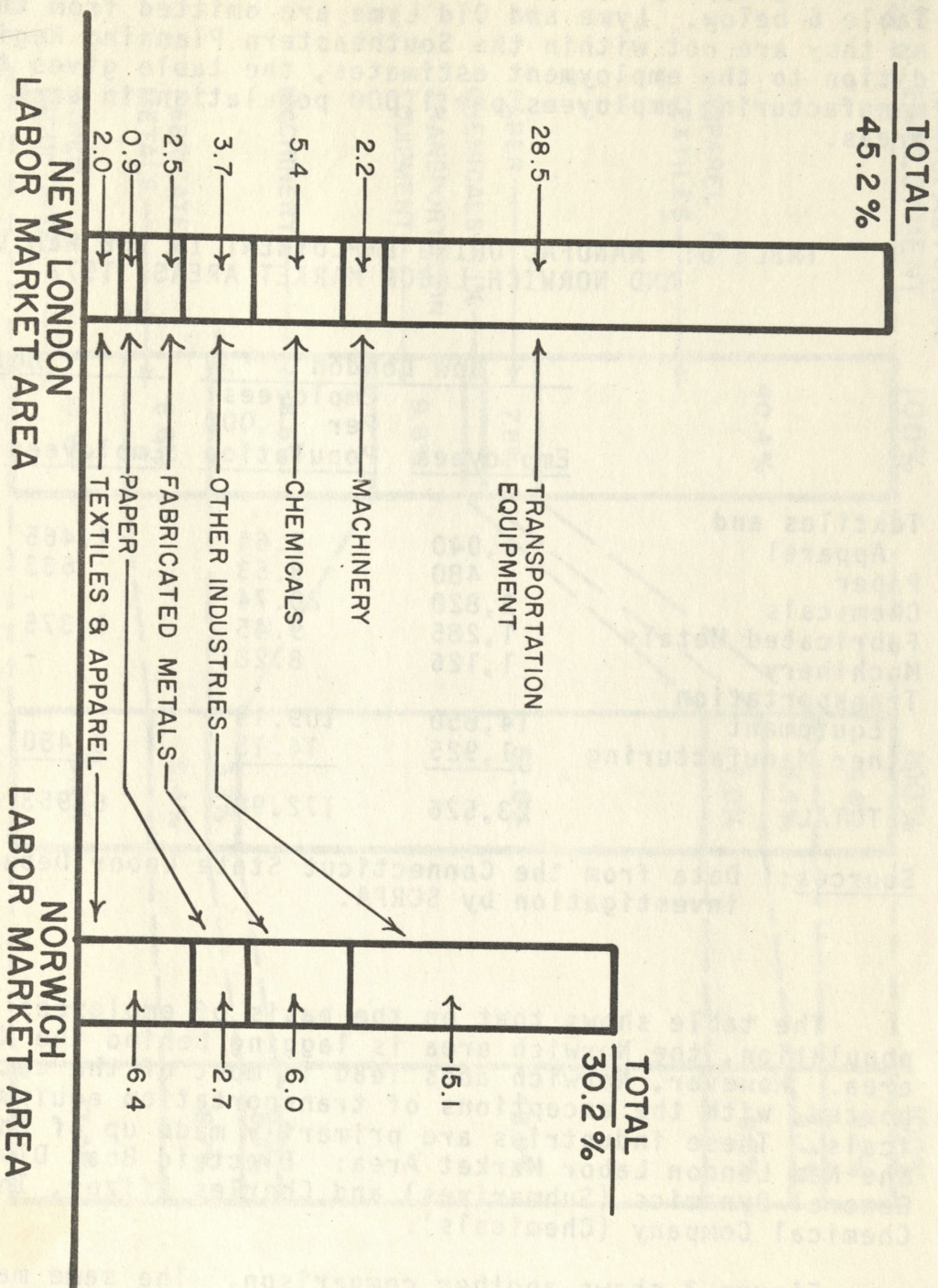


FIG. 3 MANUFACTURING EMPLOYMENT AS A PERCENTAGE OF TOTAL EMPLOYMENT, NORWICH AND NEW LONDON LABOR MARKET AREAS, 1972

5 rate

Thus while the New London area is undoubtedly the center of industrial employment in Southeastern Connecticut, it could be said that the Norwich Labor Market Area has a much more diversified industrial base. ✓

That while the New London area is undoubtedly the center of industrial employment in southeastern Connecticut, it could be said that the greater Labor Market area has a more diversified industrial base.

1. The New London area is the center of industrial employment in southeastern Connecticut. It is the largest industrial area in the state and has a diversified industrial base. It is the center of the Labor Market area.

IV. RETAIL TRADE

As stated in the SCRPA 1964 report on the regional economy,* retail trade is a basic service industry which produces no product of its own but performs the necessary task of getting the goods produced by the manufacturing or other industries into the hands of the public. Trade is of concern from a planning standpoint for four reasons: (1) it is essential to the well being of the population, (2) it is an important land use, (3) it is a significant employer of the labor force, and (4) it is a major generator of traffic flow.

This section will attempt to answer four questions:

1. What is the relationship of trade to the Region's population and to other forms of employment?
2. What types of retail sales are made in this Region, and how do they differ from town to town?
3. Where do people shop?
4. What changes have taken place in the past ten years?

RETAIL TRADE EMPLOYMENT

To examine this subject, the three categories of urban, suburban and rural towns have been employed.

Table 7 gives the relationship of retail employment to population for these three categories of towns, for 1960 and 1972.

In the following table, the employment data is subject to some inaccuracy due to Department of Labor regulations which prohibit disclosure of employment data for single firms. This is especially true of the smaller numbers, and in this case, for the rural towns.

The comparison between 1960 and 1972 reveals that retail trade concentration in the urban towns has increased. Also, the total number of people employed in retail trade has remained almost the same, while the total regional population has increased 29%. Another way of looking at these relationships is shown in Table 8.

Table 8 illustrates clearly that retail trade employment is down as a percentage of the regional population. The trend noted in the SCRPA 1964 report** of increasing concentration of retail

* Regional Economy, 1964, Southeastern Connecticut Regional Planning Agency, page 30.

** Regional Economy, 1964, Southeastern Connecticut Regional Planning Agency, page 31.

TABLE 7: RELATIONSHIP OF RETAIL TRADE EMPLOYMENT
TO POPULATION, SOUTHEASTERN CONNECTICUT
REGION, 1960 AND 1972

1960

	Population		Retail Employment	
	Number	% of Total	Number	% of Total
Urban Towns	102,625	58.9	8,713	78.2
Suburban Towns	65,288	37.4	2,211	19.8
Rural Towns	6,499	3.7	225	2.0
Total:	174,412	100.0	11,149	100.0

Sources: 1960 Census of Population, Connecticut Labor Department.

1972

	Population		Retail Employment	
	Number	% of Total	Number	% of Total
Urban Towns	112,600	50.0	9,150	82.5
Suburban Towns	101,800	45.2	1,880	17.0
Rural Towns	10,700	4.8	60	0.5
Total:	225,100	100.00	11,090	100.0

Sources: Population estimates from the Connecticut State Department of Health. Employment data from the Connecticut State Department of Labor.

trade employment in the urban towns has become even more intense. This would seem to be a symptom of the increasing urbanization of the region and increasing utilization of automobiles, both of which tend to decrease the importance of the small rural stores.

There has been very little change in the ratio of retail employment to manufacturing employment since the years immediately following World War II, as shown in Table 9.

As mentioned in the SCRPA 1964 report,* the probable reason

* Regional Economy, 1964, Southeastern Connecticut Regional Planning Agency, page 33.

TABLE 8: RETAIL TRADE EMPLOYEES PER 1,000 POPULATION,
1960 AND 1972

	<u>1960</u>	<u>1972</u>
Urban Towns	84	81
Suburban Towns	35	17
Rural Towns	37	5
Regional Average	64	49

Sources: 1960 U.S. Census of Population for 1960. Population data, Connecticut State Department of Health for 1972. Population estimates and Connecticut State Department of Labor for employment estimates.

TABLE 9: RELATIONSHIP OF RETAIL AND MANUFACTURING
EMPLOYMENT, SOUTHEASTERN CONNECTICUT
REGION, 1947-1972

	<u>Manufacturing Employment</u>	<u>Retail Employment</u>	<u>Retail Jobs Per 10 Manufacturing Jobs</u>
1947	17,440*	9,390**	5
1960	25,730	11,150	4
1963	31,420	12,230	4
1972	29,933	11,090	4

* Includes jobs covered by unemployment insurance only. About 99% of all manufacturing jobs are covered.

** For years prior to 1972 includes jobs covered by unemployment insurance plus the estimated number of uncovered jobs. For 1972, includes covered jobs only, but the Connecticut Labor Department now estimates that at least 99% of all retail jobs are covered, because of revisions in the Connecticut unemployment insurance law since 1963.

Source: Connecticut Labor Department.

for the slight decline from 5 retail jobs per 10 manufacturing jobs between 1947 and 1960 was the influx of workers from outside the region resulting from expansion of Electric Boat. Since 1960, this ratio has not changed appreciably.

RETAIL SALES

Regional data for retail sales are summarized in Table 10 below, for 1962 and 1972.

TABLE 10: TOTAL RETAIL SALES, SOUTHEASTERN CONNECTICUT REGION, 1962 AND 1972

<u>Types of Sales</u>	<u>1972</u>		<u>1962</u>	
	<u>Thousands of \$</u>	<u>% of Total</u>	<u>Thousands of \$</u>	<u>% of Total</u>
Food	141,833	28.1	91,067	36.1
Apparel	17,128	3.4	14,517	5.7
General Merchandise	51,928	10.2	22,460	8.9
Automotive Equipment	135,261	26.7	48,778	19.3
Furniture and Fixtures	30,668	6.0	15,313	6.1
Building	49,700	9.8	19,014	7.5
Miscellaneous	80,366	15.8	41,489	16.4
Total:	506,884	100.0	252,638	100.0

Sources: 1962, Connecticut Development Commission.
1972, Connecticut Department of Commerce.

The 1962 data does not include the Town of Colchester. In 1963, the regional population, not including Colchester, was 185,800.* If this figure is divided by the retail sales total for 1962 given above, an approximation to the expenditures per person in 1962 would be \$1,359. If retail sales for Colchester are subtracted from the 1972 figures, and Colchester's population is also subtracted from that of the total region, then a comparable figure for 1972 would be \$2,249 per person, an increase by a factor of 1.65. The figure for sales per person can then be adjusted for inflation by use of the consumer price index information given by the U.S. Department of Commerce. Their information indicates that the purchasing power of the dollar has declined to 68% of its 1962 value. Therefore, allowing for this inflationary effect, expenditures per person are slightly above estimated average price increases, but broadly speaking real costs to the consumer were not very different in 1972 from those of 1962.

Comparison of the 1972 percentages of total sales shown in

* Weekly Health Bulletin, March, 1963, Connecticut State Department of Health. This is the earliest year for which data is now available.

Table 10 for 1972 with those of 1962 is of interest. In 1972 28.1% of total expenditures were for food, in contrast to 36.1% in 1962. Expenditures for automotive equipment rose from 19.3% to 26.7%. Thus in 1972 they approached expenditures for food. Relative expenditures for other categories of goods do not seem to have changed to any great degree.

Table 11 gives 1972 retail sales by town, as estimated by the Connecticut Department of Commerce. Table 12 gives similar data for 1962, provided by the Connecticut Development Commission for the SCRPA 1964 report.* This is reprinted here as an aid to the reader who desires to make individual town-by-town comparisons.

Table 13 draws comparisons between 1962 and 1973 derived from the data given above. Examination of the table shows several interesting trends.

There has been a drop in the percentage of the retail dollar which goes for food in both the urban and rural towns. Food sales are concentrating more in the suburban towns. This would seem to follow the population shift to the suburbs and also the growing utilization of automobiles in the past decade.

Apparel and general merchandise sales are still strongly centered in the urban towns.

As mentioned above, automotive equipment sales have increased strongly in overall percentage of regional sales, but most of the increase seems to be in the urban towns. In the rural and suburban towns, automotive equipment held its own during the 1962-1972 decade, however.

Furniture and fixtures seems to be a fairly constant category which has not changed very much during the period under investigation.

Building has increased strongly in the rural and suburban towns. This trend is probably related to the tendency of building supply companies and lumber yards to locate in undeveloped areas where land is available along the major roads and to the rapid population growth experienced by a number of the suburban towns.

In the miscellaneous category, the greatest percentage increase is in sales in rural towns, while the percentage is declining in suburban towns. However, looking back to Table 10, the overall regional percentage of sales in this category has not changed very much. Thus the small stores necessary for the rural population would seem to be holding their own, while in suburban

* Regional Economy, 1964, Southeastern Connecticut Regional Planning Agency, Table 8.

TABLE 11: ESTIMATED RETAIL SALES, 1972
(Thousands of Dollars)

Southeastern Connecticut Region

	<u>Food</u>	<u>Apparel</u>	<u>General Merchandise</u>	<u>Automotive</u>	<u>Furniture And Fixtures</u>	<u>Building</u>	<u>Miscellaneous</u>	<u>Total</u>
Bozrah	404	12	-	319	17	940	390	2,082
Colchester	6,464	437	681	4,942	1,415	642	1,873	16,454
East Lyme	9,014	686	513	3,961	259	3,032	3,135	20,600
Franklin	129	-	-	1,004	701	1,736	3,656	7,226
Griswold	2,589	102	205	1,779	1,031	1,150	1,650	8,506
Groton	22,740	3,358	2,284	50,569	4,160	4,664	11,549	99,324
Ledyard	1,694	20	4,025	298	1,385	14,198	1,357	22,977
Lisbon	2,313	16	96	482	319	123	151	3,500
Montville	3,584	225	345	1,334	364	1,155	1,306	8,313
New London	27,958	5,684	23,645	26,951	10,842	7,807	18,520	121,407
North								
Stonington	894	24	9	682	79	34	165	1,887
Norwich	38,579	5,913	14,910	26,826	5,488	7,259	21,022	119,997
Preston	344	3	113	121	10	549	46	1,186
Salem	314	21	34	159	2	-	45	575
Sprague	693	12	47	70	26	166	467	1,481
Stonington	9,734	301	1,911	12,181	2,318	3,532	5,757	35,734
Voluntown	663	-	13	66	15	12	92	861
Waterford	13,723	314	3,097	3,517	2,237	2,701	9,185	34,774
Totals:	141,833	17,128	51,928	135,261	30,668	49,700	80,366	506,884

Source: Connecticut Department of Commerce.

TABLE 12: ESTIMATED RETAIL SALES, 1962
(Thousands of Dollars)

Southeastern Connecticut Region

	Food	Apparel	General Merchandise	Automotive	Furniture And Fixtures	Building	Miscellaneous	Total
Bozrah	214	1	45	29	1	32	139	461
East Lyme	4,842	299	387	1,783	120	1,616	1,054	10,101
Franklin	15	-	-	139	108	14	315	591
Griswold	3,294	32	140	728	77	504	1,609	6,384
Groton	12,337	2,106	3,816	6,185	1,612	1,974	4,869	32,899
Ledyard	942	-	1,266	82	11	454	310	3,065
Lisbon	1,073	-	-	25	10	26	44	1,178
Montville	1,483	*	120	807	208	287	951	3,856
New London	29,844	5,936	8,782	14,475	6,749	4,716	10,815	81,317
North								
Stonington	365	-	56	160	1	30	21	633
Norwich	25,901	5,672	6,971	12,643	3,144	4,852	9,158	68,341
Preston	-	-	56	61	6	208	66	397
Salem	111	-	-	65	-	4	4	184
Sprague	647	3	19	47	58	297	196	1,267
Stonington	7,188	249	685	9,305	2,116	2,645	8,931	31,119
Voluntown	428	-	7	69	7	-	10	521
Waterford	2,383	219	110	2,175	1,085	1,355	2,997	10,324
Totals:	91,067	14,517	22,460	48,778	15,313	19,014	41,489	252,638

* Sales of less than \$500.

Source: Connecticut Development Commission.

TABLE 13: RETAIL SALES COMPARISONS,
SOUTHEASTERN CONNECTICUT REGION
1962 AND 1972

(Thousands of Dollars)

<u>URBAN TOWNS</u>	<u>1972</u>	<u>% Of Total</u>	<u>1962</u>	<u>% Of Total</u>
Food	89,277	26.2	68,082	37.3
Apparel	14,955	4.4	13,714	7.5
General Merchandise	40,839	12.0	19,569	10.8
Automotive	104,346	30.6	33,303	18.2
Furniture and Fixtures	20,490	6.0	11,505	6.3
Building	19,730	5.8	11,542	6.3
Miscellaneous	51,091	15.0	24,842	13.6
Total:	340,728	100.0	182,557	100.0
<u>SUBURBAN TOWNS</u>				
Food	50,152	32.7	21,852	32.3
Apparel	2,116	1.4	802	1.2
General Merchandise	11,033	7.2	2,783	4.1
Automotive	28,685	18.7	15,013	22.2
Furniture and Fixtures	9,364	6.1	3,691	5.5
Building	27,248	17.7	7,392	10.9
Miscellaneous	24,927	16.2	16,158	23.8
Total:	153,525	100.0	67,691	100.0
<u>RURAL TOWNS</u>				
Food	2,404	19.0	1,133	47.4
Apparel	57	0.5	1	0.1
General Merchandise	56	0.4	108	4.5
Automotive	2,230	17.7	462	19.3
Furniture and Fixtures	814	6.4	117	4.9
Building	2,722	21.6	80	3.3
Miscellaneous	4,348	34.4	489	20.5
Total:	12,631	100.0	2,390	100.0
GRAND TOTALS:	506,884		252,638	

Sources: 1972 Data, Connecticut Department of Commerce.
1962 Data, Connecticut Development Commission.

areas this category of purchase is decreasing as a percentage of the retail dollar. Types of sales included in this category are drugs, hardware, fuel and ice, jewelry, leather, and sporting goods.

It is interesting to compare the retail trade employment data given in Table 7 with the retail sales data given in Table 13. This is done in Table 14 below.

TABLE 14: RETAIL SALES AND EMPLOYMENT,
SOUTHEASTERN CONNECTICUT,
1960-1972.

	1972		1962	
	Retail Trade Employment		Retail Sales	
	Number	%	Thousands of \$	%
Urban Towns	9,150	82.5	340,728	67.3
Suburban Towns	1,880	17.0	153,525	30.3
Rural Towns	60	0.5	12,631	2.4
Total:	11,090	100.0	506,884	100.0

	1960		1962	
	Retail Trade Employment		Retail Sales	
	Number	%	Thousands of \$	%
Urban Towns	8,713	78.2	182,557	72.2
Suburban Towns	2,211	19.8	67,691	26.8
Rural Towns	225	2.0	2,390	1.0
Total:	11,149	100.0	252,638	100.0

Sources: Employment Data, Connecticut Labor Department.
Retail Sales Data, 1972, Connecticut Department of
Commerce. 1962, Connecticut Development Commission.

This table shows that while the numbers and the percentage of the region's retail employees in the urban towns has increased, the percentage of total retail sales in these towns has decreased. Thus the percentage of sales per employee has decreased. From this it could be inferred that the profitability of urban stores has decreased. In the suburban towns, the percentages of both sales and employment have increased slightly. Thus a suburban location would seem more attractive for retail commerce than an

urban one. In the rural towns, the numbers are too limited for meaningful comparisons to be made, due to Connecticut Labor Department restrictions, as mentioned earlier.

It is too early to tell whether the retail strength of the suburban towns will be decreased by current problems with automobile transportation. It may be that the downtown areas of Norwich and New London can stage a comeback. New London's Captains Walk, the pedestrian shopping mall on the former State Street, may prove to be a significant asset to that city.

Ever since shortly after World War II when construction of military submarines became the dominant industry in Southeastern Connecticut, the need for diversification of employment opportunities has been felt. One means of helping to fulfill this need has been the tourist industry.

At the present time, indications are that tourist activity is on the increase. For example, annual attendance at Mystic Seaport has increased from 305,000 in 1962 to 510,000 in 1972. At least 250 new year-round motel and hotel rooms have been built in the region since 1972,* and over 150 of them have been built in the Mystic area. Norwich has seen the construction of the Norwich Sheraton Motor Inn with 129 rooms, and a 150-room motor hotel is currently being proposed for part of the Winthrop Urban Renewal Area in New London. The opening of the new Mystic Marineland Aquarium has also added an important new tourist attraction to the area.

Mystic Seaport is still the single most important tourist attraction in the region. In order to overcome the adverse effects of the current gasoline shortage, Mystic Seaport is embarking on a program of cooperative tours with other attractions. These make it possible for the overnight visitor, arriving in the area by public transportation, to spend the night in an area motel and visit Mystic Seaport and other attractions in the area as a part of a coordinated program. Thus far this program is for the most part restricted to the area immediately adjacent to Mystic. But it would seem that an extension of this scheme could be employed to make some of the other attractions in the region better known, and also make it convenient for visitors to get to them.

* Market Data, July, 1973, and July, 1972. Chamber of Commerce of Southeastern Connecticut.

urban area. In the rural towns, the numbers are too limited for meaningful comparisons to be made, due to Connecticut labor department restrictions, as mentioned earlier.

It is too early to tell whether the retail strength of the suburban towns will be decreased by current problems with automobile transportation. It may be that the downtown areas of Norwich and New London can stage a comeback. New London's Captain's Walk, the pedestrian shopping mall on the former State Street, may prove to be a significant asset to that city.

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Submitted at the request of the Connecticut State Department of Transportation, July, 1973, and July, 1972. Prepared by the Connecticut State Department of Transportation, Office of Planning and Development.

V. AGRICULTURE

The gradual decline, starting in the latter half of the nineteenth century, in the importance of agriculture in the economy of Southeastern Connecticut is still very evident. From an activity that claimed more than half the labor force 100 years ago, agriculture has dwindled to less than 2% of the region's employment. However, agriculture is a major user of land in the region, and contributes greatly to keeping the land in an open condition. To encourage agriculture is to help maintain a desirable physical and visual environment.

At the present time, the two major categories of agricultural activity in the region are poultry farming, primarily egg production, and dairy farming. In addition, the growing of horticultural products for sale to homeowners and landscaping firms is a significant agricultural enterprise.

Gross sales of agricultural products are estimated to total \$22 million in 1973.* In 1963 agricultural sales totaled \$9.8 million. Table 15 gives the percentages of total gross sales in the important agricultural products for 1963 and 1973.

TABLE 15: CATEGORIES OF AGRICULTURAL SALES,
SOUTHEASTERN CONNECTICUT, 1963 AND 1973

	<u>1963</u>	<u>1973</u>
Poultry	42%	47%
Dairy Products	39%	47%
Other	19%	6%

Source: Department of Agricultural Economics, University of Connecticut.

The table demonstrates the increasing specialization that is taking place. Both poultry and dairy farming are capital-intensive, buying their concentrated materials in the form of grain imported from other parts of the country. In the poultry category, production of broilers is sharply curtailed with most farms now converted to egg production.

SCRPA's analysis of regional land use** indicates that in

* Professor Arthur Dewey, Department of Agricultural Economics, University of Connecticut, Storrs, Connecticut.

** Population and Development, 1970, Southeastern Connecticut Regional Planning Agency, 1972, page 53.

1970 there were 38.8 square miles of agricultural land in the region, which comprised 6.9% of the total regional land area. In 1962, the comparable figure was 42 square miles.* Most of this land is used for dairy farming and horticultural enterprises. Major dairy crops consist of corn and alfalfa, both of which are used as cattle feed.

The land use figures are comparable to figures from the Department of Agricultural Economics of the University of Connecticut, which has estimated that approximately 24,000 acres or 37 square miles of crop land were harvested in the region in 1963; and approximately 18,000 acres or 28 square miles in 1973. Since the SCRPA estimates includes all agricultural land, the differences between the crop land estimates of the University of Connecticut and the SCRPA figures can be accounted for by pasture land.

Table 16 shows the distribution by town of numbers of dairy farms and dairy cows two years old or older in the region. The average number of cows per farm is shown for each town. Total figures for the state and a statewide average are also given.

In dairy farming, Franklin and Preston stand out as the two towns with the most cows, although comparison of the average number of cows per farm would indicate that the farms in Franklin are considerably larger than those of Preston. Bozrah, Colchester, Griswold, Sprague and Voluntown also have relatively large numbers of cows. It is interesting to note that even Norwich, one of the region's urban towns, has a significant amount of activity in dairy farming. Table 16 shows that there are 125 dairy farms in the region. Most of these are family-run organizations.

Approximately 250 people are estimated** to be employed in dairy farming. The University also estimates that about 100 people are employed in the processing of feed for both poultry and dairy farms. The feed is shipped in to local processing plants from the other parts of the country.

It is also estimated** that on a poultry farm of the most modern sort, where the hens are kept in cages, one man can care for 30,000 birds. On a poultry farm of the older variety, where the birds are kept "on the floor," one man is required for every 10,000 birds. The number of birds in Southeastern Connecticut is estimated to be about 5 million, of which half are kept "on the floor," and half of which are kept as "caged layers." On this basis, the number of people employed in poultry farms can be

* Land Use Patterns and Policies, 1962, Southeastern Connecticut Regional Planning Agency, page 26.

** Professor Arthur Dewey, Department of Agricultural Economics, University of Connecticut, Storrs, Connecticut.

TABLE 16: DISTRIBUTION OF DAIRY FARMS AND COWS,
SOUTHEASTERN CONNECTICUT REGION, 1973

	<u>Number of Dairy Farms</u>	<u>Number of Cows 2 Years Old And Over</u>	<u>Cows Per Farm</u>
Bozrah	7	267	38.1
Colchester	7	369	52.7
East Lyme	2	57	28.5
Franklin	13	1,059	81.5
Griswold	10	645	64.5
Groton	1	28	28.0
Ledyard	9	322	35.7
Lisbon	4	184	46.0
Montville	2	128	64.0
New London	0	0	0
North Stonington	18	262	14.6
Norwich	10	431	43.1
Preston	22	1,166	53.0
Salem	5	331	66.2
Sprague	3	223	74.3
Stonington	6	195	32.5
Voluntown	4	414	103.5
Waterford	<u>2</u>	<u>48</u>	<u>24.0</u>
REGIONAL TOTALS:	125	6,129	49.0
STATE TOTALS:	905	56,784	62.7

Source: Dairy Division, Connecticut Department of Agriculture.

estimated at about 400. In addition, approximately 100 people are employed in packaging and processing eggs, making a total of 500 people who gain their living directly from poultry farming. Also, it is estimated that another 500 people have a part-time business of raising pullets for sale to the large egg producing farms.

Thus a total of about 850 people can be estimated to be employed in agriculture in the region at the present time. This figure can be compared to the total regional employment figure of the Connecticut Labor Department for 1972 of 75,310. On this basis agriculture would account for 1.1 percent of regional employment.

As stated in the SCRPA 1964 report on the regional economy,* agriculture can be both compatible and desirable in an urbanizing region. The wide expanses of open land needed for crops and pasture by dairy farmers are important open space uses. As such they will become even greater assets in the future.

The most important difficulty faced by agriculture in the region has been competition from the development caused by population growth. One means of helping to preserve agriculture in the region in the future may be Public Act 490 of the 1963 Legislature. This Act provides for special assessments for agricultural, forest, and open space lands. Under the Act, a farmer may apply for an assessment based on the land's value for agricultural use rather than on the value of nearby similar land which has been sold for development. The intent is to provide aid to the farmer in keeping his land in agriculture. An amendment adopted in 1972 provides for a penalty which the farmer must pay to the town if he does sell the land for development after having received tax benefits. Thus far, this legislation has had little effect in Southeastern Connecticut, principally because agricultural assessments are still for the most part based on use value. As this situation changes, the Act may become an important aid, not only to the farmer, but for the preservation of woodland and open space as well.

Agriculture in Southeastern Connecticut forms a part of the national agricultural system, and thus reflects changes that are taking place in other parts of the country. There is a nationwide trend towards specialization of agricultural activities, and towards increases in the size of farms. Agricultural employment is decreasing all over the country, as it is in Southeastern Connecticut, but productivity per worker is increasing. It is to be hoped that Southeastern Connecticut's farms will remain competitive in the national market place.

* Regional Economy, 1964, Southeastern Connecticut Regional Planning Agency, page 9.

estimated at about 100,000 people, and the number of people engaged in fishing and processing is about 200 people who gain their living directly from primary fishing. Also, it is estimated that another 500 people have a part-time business of raising guinea pigs for sale to the large egg processing firms.

Another source of income for the people of the region is provided in agriculture in the region at the present time. This figure can be compared to the total regional employment figure of the Department of Labor for 1972 of 75,000. The total regional employment figure would account for 1.1 percent of regional employment.

As stated in the 1982 report on the regional economy, agriculture can be both profitable and desirable in an underdeveloped region. The wide expansion of open land needed for crops and pastures by dairy farmers will increase open space land. As such, they will become even greater assets in the future.

The most important difficulty faced by agriculture in the region has been competition from the development caused by population growth. The means of helping to overcome this competition in the future will be public aid and the 1982 report. This Act provides for special assessments for agricultural, forest, and open space lands. Under the Act, a farmer may apply for an assessment based on the land's value for agricultural use rather than on the value of nearby similar land which has been sold for development. The intent is to provide a fair assessment in keeping his land in agriculture. An assessment of 10 to 20 percent of a parcel's value which the farmer must pay to the local government will be the land for development after having been sold for development. This legislation has had little effect in the eastern Connecticut, particularly because agricultural assessment and the most part, assessed on the value of the land. The Act may become an important and effective change, but for the preservation of woodland and open space in the region.

Agriculture in Connecticut is dependent upon a number of national, agricultural systems, and this reliance changes over time. Taking place in other parts of the country, there is a growing trend toward specialization of agricultural activities. Connecticut is also in the same situation. Connecticut is dependent on all over the country, as is the United States. It is difficult, but productivity per worker is important. It is noted that Connecticut's dependence on a few major crops live in the national market place.

VI. MILITARY AND DEFENSE EMPLOYMENT

TABLE 17: DEFENSE EMPLOYMENT, SOUTHEASTERN
CONNECTICUT REGION, 1963-1973

Year	Total	Defense	Non-Defense
1963	14,700	10,000	4,700
1964	15,000	10,500	4,500
1965	15,500	11,000	4,500
1966	16,000	11,500	4,500
1967	16,500	12,000	4,500
1968	17,000	12,500	4,500
1969	17,500	13,000	4,500
1970	18,000	13,500	4,500
1971	18,500	14,000	4,500
1972	19,000	14,500	4,500
1973	19,500	15,000	4,500

As has been the case ever since World War II, a very large part of the economy of Southeastern Connecticut in the last ten years has been supported by defense industry and by the presence of large numbers of military personnel. The major installations are the Electric Boat Division of General Dynamics Corporation in Groton, which is engaged in submarine design and construction; the U.S. Navy Submarine Base, also in Groton; the New London Laboratory of the Naval Underwater Systems Center; and the U.S. Coast Guard Academy. In addition there are several Coast Guard cutters based in New London, as well as the New London Coast Guard Station. In this section, employment and income data are presented to draw a comparison between the region's current degree of defense industry dependence and that of ten years ago.

This discussion does not consider the secondary employment that is generated by the earnings of defense workers and military personnel, nor does it consider employment by other military contractors in the region. Most of the latter are subcontractors, and their effect on the region's economy is minor.

EMPLOYMENT

The basic employment data are presented below in Table 17.

TABLE 17: DEFENSE EMPLOYMENT, SOUTHEASTERN CONNECTICUT REGION, 1963-1973

	<u>1973</u>	<u>% of Total</u>	<u>1963</u>	<u>% of Total</u>
1. Defense Employment				
Military Personnel	14,100	15.4	13,000	16.4
Civilian Employees of Military Bases	2,300	2.5	2,300	3.0
Employees of General Dynamics/Electric Boat	<u>14,700</u>	<u>16.0</u>	<u>17,500</u>	<u>22.1</u>
Defense Employment Total:	31,100	33.9	32,800	41.5
2. Other Non-defense Employment	60,600	66.1	46,300	58.5
3. Total Employment	91,700	100.0	79,100	100.0

Sources: Connecticut Labor Department, U.S. Navy, U.S. Coast Guard, General Dynamics/Electric Boat Division.

At the present time, defense employment accounts for almost 34% of the total number of jobs in the region, in contrast to almost 42% in 1963. However, the percentage seems likely to go up again in the next few years with the currently planned expansion at Electric Boat. That company has received an increased number of orders for attack submarines and is a major participant in the Trident program under which a new fleet of strategic missile submarines will be constructed.

Another measure of the difference between the effect of defense activity on the regional economy in 1963 and that in 1973 is the total number of people dependent on defense activities. These are estimated in Table 18.

The 1973 data in this table were derived by multiplying the numbers of employees and military personnel by the regional mean family size. This assumes one "wage earner" per family. An exception to this is the U.S. Navy active duty personnel, for which direct data were obtained. The 1963 data are those from the SCRPA report on the regional economy of 1964.

TABLE 18: ESTIMATED RESIDENT DEFENSE EMPLOYEES
AND DEPENDENTS, SOUTHEASTERN
CONNECTICUT REGION, 1973 AND 1963

	<u>1973</u>	<u>1963</u>
Military Personnel and Dependents	47,257	30,650
Civilian Employees of Military Bases and Dependents	7,247	7,488
General Dynamics/Electric Boat Employees Residing in the Region and Dependents	<u>32,876</u>	<u>31,244</u>
Totals:	87,380	69,382
Percentage of total regional population dependent on defense employment	39%	36%

Sources: U.S. Navy, U.S. Coast Guard, General Dynamics/Electric Boat Division, Connecticut Department of Health.

In Table 19, which compares Electric Boat employment by town for 1973 and 1963, it can be seen that while some towns have changed markedly in the number of residents who work at the ship-

TABLE 19: EMPLOYMENT AND PLACE OF RESIDENCE,
EMPLOYEES OF GENERAL DYNAMICS/
ELECTRIC BOAT DIVISION, 1963 AND 1973

	1973		1963	
	Number of Employees	% Of Total	Number of Employees	% Of Total
Bozrah	38	0.3	55	0.3
Colchester	106	0.7	-	-
East Lyme	571	3.8	525	3.0
Franklin	18	0.1	35	0.2
Griswold	199	1.4	210	1.2
Groton	2,496	16.9	3,450	19.7
Ledyard	896	6.1	480	2.8
Lisbon	103	0.7	60	0.3
Montville	861	5.8	840	4.8
New London	1,459	9.9	2,750	15.7
North Stonington	258	1.8	150	0.9
Norwich	1,390	9.5	1,750	10.0
Preston	24	0.2	20	0.1
Salem	15	0.1	15	0.1
Sprague	111	0.8	10	0.1
Stonington	623	4.2	350	2.0
Voluntown	98	0.7	75	0.4
Waterford	<u>1,008</u>	<u>6.9</u>	<u>1,050</u>	<u>6.0</u>
Total S.E.				
Connecticut:	10,274	69.9	11,825	67.6
Other				
Connecticut:	1,108	7.5	1,750	10.0
Rhode Island:	3,154	21.5	3,800	21.7
Other:	<u>169</u>	<u>1.1</u>	<u>125</u>	<u>0.7</u>
Total:	14,705	100.0	17,500	100.0

Source: General Dynamics/Electric Boat Division.

TABLE 20: EMPLOYMENT AT GENERAL DYNAMICS/ELECTRIC
BOAT DIVISION COMPARED TO THE TOTAL CIVILIAN
LABOR FORCE, SOUTHEASTERN CONNECTICUT REGION

	Employment At Electric Boat, 1973	Civilian Labor Force 16 And Older, 1970	% Of Civilian Labor Force Employed At Electric Boat
Bozrah	38	898	4.2
Colchester	106	2,564	4.1
East Lyme	571	4,145	13.8
Franklin	18	582	3.1
Griswold	199	3,023	6.6
Groton	2,496	10,896	22.9
Ledyard	896	3,666	24.4
Lisbon	103	1,075	9.6
Montville	861	5,859	14.7
New London	1,459	11,498	12.7
North Stonington	258	1,349	19.1
Norwich	1,390	16,421	8.5
Preston	24	1,382	1.7
Salem	15	585	2.6
Sprague	111	1,150	9.7
Stonington	623	6,559	9.5
Voluntown	98	697	14.1
Waterford	<u>1,008</u>	<u>6,870</u>	<u>14.7</u>
Regional Totals:	10,274	79,219	13.0

Sources: General Dynamics/Electric Boat Division; 1970 U.S.
Census.

yard, the overall regional total is not significantly different from that of 10 years ago. However, the drop in New London, and Groton, together with the increases in Ledyard, North Stonington and Sprague, should be noted. A shift in residence from the urban areas to the suburban towns is indicated.

Table 20 compares the previous figures on Electric Boat's employment for 1973 with the number of people 16 years old or older in the civilian labor force for each town. These latter figures are those of the 1970 U.S. Census. The ratio between the two figures in the table for each town gives a rough measure of the fraction of the people in the work force who are employed at Electric Boat.

Table 20 shows that the towns with the higher fractions of the work force employed at Electric Boat are for the most part those towns which are the most densely populated and most highly developed.* This core extends up and down the Thames River from Norwich to New London, and along the coast from East Lyme to Stonington. However, the significantly high ratio in North Stonington is a departure from this pattern, and indicates a trend in this rural town towards a more suburban character.

INCOME

Table 21 below gives figures for the 1970 payrolls of the major defense installations in the region.

TABLE 21: TOTAL INCOME DERIVED FROM DIRECT MILITARY
AND DEFENSE EMPLOYMENT, SOUTHEASTERN
CONNECTICUT REGION, 1973

Navy Military Personnel	\$129,034,000
Navy Civilian Personnel	39,813,000
Coast Guard	11,177,000
General Dynamics/Electric Boat	<u>150,000,000</u>
Total:	\$330,024,000

Sources: U.S. Navy, U.S. Coast Guard, General Dynamics/Electric Boat.

* Population and Development, 1970, Southeastern Connecticut Regional Planning Agency, January, 1972, pages 10 and 45.

It is estimated, using data from the 1970 U.S. Census,* adjusted for inflation and population increase, that the total income of Southeastern Connecticut residents in 1973 was about \$764 million. On this basis, over 40% of the total direct income in the region is derived from military personnel and defense industry, not including purchases from suppliers, and not including income derived from retail purchases by defense employees and military personnel.

* Bureau of the Census, Census Tracts, PCH(1)-143, Table P-4.

VII. NORWICH-NEW LONDON LABOR MARKET COMPARISON

Since World War II and the decline of the textile industry in New England, the Norwich Labor Market Area has lagged behind the New London Labor Market Area in economic strength. This section sketches a comparison between the relative positions of the two areas over the past 10 years. The towns which make up each Labor Market Area are listed in the Introduction to this report.

The basic data are contained in Table 22 below and are compared and discussed in the following paragraphs.

TABLE 22: POPULATION, EMPLOYMENT, RETAIL TRADE,
AND INCOME COMPARISON, NORWICH AND
NEW LONDON LABOR MARKET AREAS,
1963 AND 1972

	1972		1963	
	Norwich	New London	Norwich	New London
Population	89,400	135,700	71,500	114,500
Manufacturing Employment	6,795	19,540	6,190	25,400
Non-Manufacturing Employment	<u>16,200</u>	<u>32,800</u>	<u>11,510</u>	<u>21,220</u>
Total Civilian Employment	22,995	52,340	17,700	46,620
Retail Trade, Millions of \$	161.2	345.7	79.1	173.5
Income, Millions of \$*	225.3	539.0		

* Income is derived from 1970 U.S. Census data adjusted for inflation and population increase.

Sources: Connecticut Labor Department, Connecticut Department of Commerce, Connecticut Development Commission, 1970 U.S. Census.

EMPLOYMENT COMPARISON

In the Norwich area manufacturing employment as a percentage of the population is slightly down, as shown in Table 23. As previously shown in Table 22 most of the employment increase in the Norwich area in the past 10 years has been in the non-manufacturing sector.

TABLE 23: MANUFACTURING EMPLOYMENT AS A PERCENT OF
POPULATION; NORWICH AND NEW LONDON
LABOR MARKET AREAS, 1963 AND 1972

	<u>1972</u>	<u>1963</u>	<u>% Decrease</u>
Norwich	7.8	8.6	9.4
New London	17.2	22.2	22.5
Norwich as % of New London	45.3	38.7	

Sources: Connecticut Labor Department and Connecticut Department of Health.

In the New London area, the percentage is significantly decreased, primarily due to the decrease in employment of Electric Boat. Norwich has slightly improved its position relative to New London, but this may change if employment at Electric Boat in Groton increases substantially, as is expected. As mentioned previously in Chapter III, Manufacturing Employment, the Norwich Labor Market Area does lead in the more diversified industries.

Non-manufacturing employment as a percentage of the population has increased in both the Norwich and New London areas. However, there are considerably more jobs in the New London area relative to the size of the population. These points are illustrated in Table 24 below.

TABLE 24: NON-MANUFACTURING EMPLOYMENT AS A
PERCENTAGE OF POPULATION; NORWICH AND
NEW LONDON LABOR MARKET AREAS,
1963 AND 1972

	<u>1972</u>	<u>1963</u>	<u>% Increase</u>
Norwich	18.1	16.1	12.4
New London	24.7	18.5	33.5
Norwich as % of New London	73.3	87.0	

Source: Connecticut Labor Department.

Total employment as a percentage of the population is again higher for the New London area than for the Norwich area in both 1972 and 1963. The percentage changes in nine years are not very great. See Table 25 below.

TABLE 25: TOTAL EMPLOYMENT AS A PERCENTAGE OF
POPULATION, NORWICH AND NEW LONDON
LABOR MARKET AREAS, 1963 AND 1972

	<u>1972</u>	<u>1963</u>	<u>% Change</u>
Norwich	25.7	24.8	3.6 Increase
New London	38.6	40.7	5.2 Decrease
Norwich as % of New London	66.6	60.9	

Sources: Connecticut Labor Department and Connecticut Department of Health.

UNEMPLOYMENT

Over the past ten years, the unemployment rate in the Norwich area has been greater than that in the New London area as shown in Table 26 below.

TABLE 26: UNEMPLOYMENT IN THE NORWICH AND
NEW LONDON LABOR MARKET AREAS,
1963 - 1973

	<u>New London</u> <u>Labor Market Area</u>		<u>Norwich</u> <u>Labor Market Area</u>	
	<u>Number</u>	<u>% Of</u> <u>Labor Force</u>	<u>Number</u>	<u>% Of</u> <u>Labor Force</u>
December, 1973	2,300	3.5	1,600	5.5
December, 1968	1,900	3.4	1,100	4.7
December, 1963	2,000	3.8	1,500	6.7

Source: Connecticut Labor Department, Labor Market Newsletters.

It can be seen that the Norwich area consistently lags behind the New London area on a percentage basis. The reasons for this are not immediately clear. One reason may be that the level of education is considerably lower in the towns of the Norwich area than in those of the New London area.* And this pattern clearly is influenced by the structure of the manufacturing industries in the two labor market areas as indicated in Figure 2 of Chapter III. The textiles, paper and fabricated metals industries, which are more dominant in the Norwich area perhaps require a higher percentage of unskilled workers than do the shipbuilding and chemical industries of the New London area.

The percentage increase in retail sales per capita is about the same for the Norwich and New London Labor Market Areas. Also their relative positions remain about the same. This is shown in Table 27 below.

TABLE 27: RETAIL SALES PER PERSON,
NORWICH AND NEW LONDON LABOR MARKET AREAS,
1963 AND 1972

	1972 (\$ Per Person)	1963 (\$ Per Person)	% Increase
Norwich	1,803	1,106	63.0
New London	2,548	1,515	68.2
Norwich as % of New London	70.8%	73.0%	

Sources: Population data from Connecticut Department of Health. 1972 retail sales data from Connecticut Department of Commerce, 1963 retail sales data from Connecticut Development Commission.

POPULATION CHANGE

Table 28 compares the population changes due to natural increase and migration between 1960 and 1970 for the Norwich and

* Social Indicators, 1970. Southeastern Connecticut Regional Planning Agency, 1973, Figure 5, page 32.

TABLE 28: POPULATION CHANGE BY NATURAL INCREASE AND
NET MIGRATION, NORWICH AND NEW LONDON
LABOR MARKET AREAS, 1960 - 1970

NORWICH LABOR MARKET AREA:

	1960	1970	% Change 1960-1970	Absolute Change	Source of Change	
					Natural Increase	Net Migration
Bozrah	1,590	2,036	28.1	446	204	242
Colchester	4,648	6,603	42.1	1,955	787	1,168
Franklin	974	1,356	39.2	382	112	270
Griswold	6,472	7,763	19.9	1,291	876	415
Lisbon	2,019	2,808	29.1	789	319	470
Norwich*	38,506	40,096	4.1	1,590	4,171	(2,581)
Preston*	4,992	4,930	(1.2)	(62)	347	(409)
Sprague	2,509	2,912	16.1	403	256	147
Voluntown	<u>1,028</u>	<u>1,452</u>	<u>41.2</u>	<u>424</u>	<u>181</u>	<u>243</u>
Totals:	62,738	69,956	11.3	7,218	7,253	(35)

NEW LONDON LABOR MARKET AREA:

East Lyme*	6,782	11,399	68.1	4,617	1,464	3,153
Groton*	29,937	38,523	28.7	8,586	7,975	611
Ledyard*	5,395	14,558	169.8	9,163	2,224	6,939
Montville	7,759	15,662	101.9	7,903	2,308	5,595
New London*	34,182	31,630	(7.5)	(2,552)	3,828	(6,380)
North Stonington	1,982	3,748	89.1	1,766	451	1,315
Salem	925	1,453	57.1	528	101	427
Stonington	13,969	15,940	14.1	1,971	1,553	418
Waterford	<u>15,391</u>	<u>17,227</u>	<u>11.6</u>	<u>1,836</u>	<u>1,685</u>	<u>151</u>
Totals:	116,322	150,140	29.1	33,818	21,589	12,229

REGIONAL
TOTALS:

179,060	220,096	22.9	41,036	28,842	12,194
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* Population figures for these towns include institutional and/or military personnel.

NOTE: Numbers in parentheses indicate a loss rather than a gain.

Source: 1970 Census 1st Count Summary Tape, Bureau of the Census.
1960 Census of Population, Bureau of the Census.

New London Labor Market Areas.* According to the table, population change in the Norwich Labor Market Area is entirely due to natural increase, while the New London Labor Market Area experienced a net in-migration of 12,194 people. However, part of the decrease in Preston and Norwich is due to decrease in the number of long-term patients at Norwich State Hospital. The non-institutional population increase in Preston was 1,073 people or a 42% gain. Thus, if the change in the State Hospital population is disregarded, the Norwich Labor Market Area would experience some in-migration rather than a net out-migration.

Nevertheless, the data imply a job market in the New London Labor Market Area that was expanding at a faster rate than that of the Norwich area.

It would appear that in the past ten years the relative economic positions of the Norwich and New London Labor Market Areas have not changed appreciably. As described in Chapter II the region functions as an economic unit with the distribution of jobs heavily weighted towards New London and Groton. It seems that functionally the Norwich area perhaps serves more as a residential area than does the New London Labor Market Area.

* Data taken from Population and Development, 1970. Southeastern Connecticut Regional Planning Agency, 1972, Table 2.

At the same time, the number of people employed in the manufacturing sector has decreased. This is due to the fact that the manufacturing sector has been in a decline since the 1970s. The number of people employed in the manufacturing sector has decreased from 1.5 million in 1970 to 1.2 million in 1980. This is a decrease of 20%. The number of people employed in the manufacturing sector has decreased from 1.5 million in 1970 to 1.2 million in 1980. This is a decrease of 20%.

Primary military and defense employment has dropped from 1.5 million in 1970 to 1.2 million in 1980. However, defense employment is still a significant part of the economy. The number of people employed in the primary military and defense sector has dropped from 1.5 million in 1970 to 1.2 million in 1980. However, defense employment is still a significant part of the economy.

VIII. SUMMARY

The New London Labor Market Area has slightly increased its position in manufacturing relative to the New London Labor Market Area. The New London Labor Market Area contains a more diversified industrial base than the New London Labor Market Area. The New London Labor Market Area contains a more diversified industrial base than the New London Labor Market Area.

There are more jobs in manufacturing employment in the New London Labor Market Area than in the New London Labor Market Area. Also, unemployment in the New London Labor Market Area has been greater than that in the New London Labor Market Area during the past ten years.

There are accounts for less than 5% of employment in the New London Labor Market Area. The most important agricultural products in the New London Labor Market Area are now poultry and dairy products. The most important agricultural products in the New London Labor Market Area are now poultry and dairy products.

Overall, employment in retail trade has remained about the same in the past 10 years, while retail sales have increased. Changes in retail trade have been due to changes in the retail trade sector. Changes in retail trade have been due to changes in the retail trade sector.

Southeastern Connecticut had a population of 225,000 in 1972. At that time employment (both civilian and military) stood at approximately 91,000.

Manufacturing dropped from 39% of civilian employment in 1959 to 34% in 1969. A reason for this is decreased employment in military submarine construction. Such construction, however, is still the most dominant manufacturing activity in the region and is expected to increase again in the near future.

The mix of manufacturing types in the region has remained relatively stable. The rise in the chemical industry has offset declines in apparel and paper.

Primary military and defense employment have dropped from 42% of total employment in 1963 to 34% in 1973. However, defense employment seems likely to rise again, because of increased activity in submarine construction, as mentioned above. At the present time, an estimated 39% of the region's population are directly dependent on primary military and defense employment for support.

Since 1963, the Norwich Labor Market Area has slightly improved its position in manufacturing relative to the New London Labor Market Area. The Norwich Labor Market Area contains a more diversified industrial base than the New London Labor Market Area, but the New London area employs slightly over twice as many people as the Norwich area.

In non-manufacturing employment, there are more jobs relative to the population in the New London Labor Market Area than in the Norwich area. Also, unemployment in the Norwich Labor Market Area has been greater than that in the New London Labor Market Area during the past ten years.

Agriculture accounts for less than 2% of employment in the region at the present time. The most important agricultural activities in Southeastern Connecticut are now poultry and dairy farming. Raising of nursery stock for sale to landscaping firms and homeowners does, however, occupy a significant though lesser position.

Overall employment in retail trade has remained about the same in the past 10 years, while retail sales, if adjusted for inflation, have kept pace with population growth. Changes in retail sales for various classes of goods are of interest. Expenditures for automotive equipment rose from 19% of total sales in 1963 to 26% in 1972. Expenditures for food dropped from 36% to 28% of total sales. While the percentage of the region's total retail trade employment located in the urban towns has increased, these towns have lost in percentage of the region's retail sales. In the suburban towns their percentage shares of both retail sales and retail trade employment have increased slightly.

In Southeastern Connecticut, the skills of the labor force are not markedly different from those of the State as a whole. In 1970, 25% of the labor force was in the professional categories as compared to 27% for the State. In the highly skilled category the region is ahead of the State 21% to 18%.

Most of the employed civilian labor force are able to find work within the region. For example, 82% of New London County residents in the labor force were so employed in 1970, although an uneven distribution of jobs makes for a complex commuting pattern in the region. However, the Town of Groton is dominant in the commuting picture.

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